

Producer Licensing Bureau Company Appointment Data Extract Information(Rev 07/2002)

SUPPLIED DATA

Please review all record layouts that are furnished for each listing. The data that is contained on these lists is identified by the record layout. This is the only data that will be appearing on each listing. If the layout does not reflect the data, the listing will not contain it. The State of California Department of Insurance (CDI) will not supply such data as phone numbers, social security numbers, residence addresses, E-mail addresses. This information is classified as sensitive data and will not be furnished on these listings. The entire listing must be ordered for each qualification selected, the CDI is unable to supply these lists in part or extract a certain volume from these lists. These lists are provided on electronic medium only. (CD-ROM or diskette.) Information on these lists, zip codes and cities are furnished to the Requester. It is the Requester's responsibility to extract, sort and format this information for the data's intended use. These extracts/sorts will not be performed for the Requester.

DATA FORMAT/SYSTEM REQUIREMENTS

The format for all listings is an ASCII flat text file only. There will be no program associated with these files and will not be formatted for the Requester's requirements. It is the Requester's responsibility to format the data for compatibility with their database. The data will be supplied on either a diskette or on a CD-ROM, depending on the size of the file/s. After obtaining the data it is the responsibility of the Requester to meet the minimum system requirements to import the data into their database. Some of these listings are very large and require a significant amount of hard disk space. To avoid system problems it is strongly recommended that the Requester verify the available disk space on their system before importing the data. The CDI can not furnish technical support for non-departmental computer systems. Responsibility for technical support on the Requester's computer system lies solely with the Requester.

Order Forms/Payment Process

The order form must be completed and sent to the contact listed on the bottom of the order form. The payment process is listed on the bottom of the order form. The CDI will not bill for this service and will not accept credit cards. It is required that a check be included with the completed order form in the amount of the entire order with the applicable sales tax included. All checks must be made payable to **State of California Department of Insurance**. Failure to comply with the payment requirements will delay the delivery process until these requirements have been satisfied. Order forms may be obtained from the contact listed on the bottom of this document.

Order Form Coding

Each list will require the following information, NAIC number, and Company Name and License type code. This information may be obtained from the CDI contact listed on the bottom of this document. Here are the most common requested codes.

LX = Life & Health, **FX** = Property & Casualty.

INDV. APPT. = Individual appointments only, **AGY. APPT.** = Agency appointments only

INDV. APPT./TERM. = Individual appointments with terminations, **AGY. APPT./TERM.** = Agency appointments with terminations

ALL = All agencies and individuals.

Pricing/List Generation

Prices are set by the CDI and are subject to change. A count for each appointment listing will be furnished upon request. It is required that this information be obtained from the contact listed on the bottom of this document. The total volume for these lists may range from 1 to 15,000 names. Currently the price for these lists are @ \$300.00 per company. (CA residents must add sales tax.). Each list is as current as the date and time they are produced. These are queried files and are updated daily.

Delivery Process

Please allow three to four weeks for delivery. All data will be mailed to the address supplied on the order form only after the payment process has been satisfied. Express delivery may be used. It is required that a prepaid return express delivery label be provided. All Requester's are responsible for expenses that are incurred by the express delivery process.

NOTE: Currently our Producer Licensing Bureau staff support this process and have priority assignments. At times this may prevent a prompt response to these inquiries, but are unavoidable. We apologize in advance for any inconvenience this may cause.